Year End Process

February, 2011

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In this tutorial, we'll review the steps you'll have to take to prepare for and actually do your rollover to the New Year. Once you do the actual year-end process, it has a certain finality to it so it's important that you do it right the first time.

Steps to Prepare for Rollover

There are several steps to complete in preparation for rolling over to the new school year.

Before you rollover to the New Year:

1. **You must have approval for your year-end clearinghouse submission.**
2. You must complete entering your calendar for the new track.
   a. Put in any events for the coming track as well as the cycle days.
3. Run end of year reports and save them all to pdf. It is also recommended that these pdf files are saved to more than one media.

Entering Calendar Data for the New Track

If you have not already set up the calendar for the new track, you will need to go to System > Track Editor > Calendar to do this.
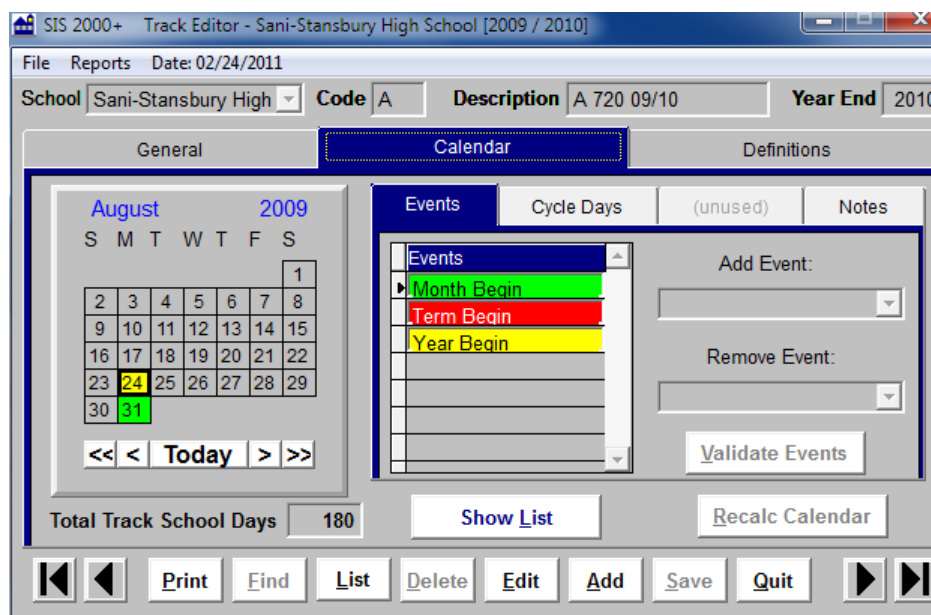
- Enter any events for the coming track. Make sure to include Term Begin and Term End days as well as any holidays, staff development days, etc.
- Go to the **Cycle Days** tab.

- Set up your cycle days for the new track.

Run End of Year Reports

There are several reports that you need to run as part of the year-end process. You'll want to save each report to pdf as well as save these pdf files to more than one form of media.

The reports you will run are:

- ✓ UT Attendance Term End Report
- ✓ Student Attendance Detail Report
- ✓ 10 Day Audit Report
- ✓ Clearinghouse Reports as archive reports
- ✓ Grades Not Finalized Report for each term
- ✓ Transcript Report
    - o Run once WITHOUT "Year End Archival" checked.
    - o Run once with "Year End Archival" checked

First, there are three Attendance reports that USOE recommends that you run:

- UT Attendance Term End
- Student Attendance Detail
- 10 day Audit Report

To run these reports, go to the Main menu > Attendance > Reports.
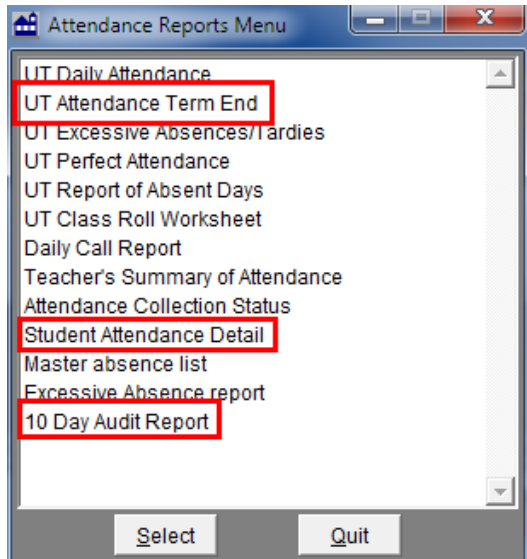
UT Attendance Term End Report

To run the "**UT Attendance Term End Report**", highlight the report and press Select.

- Choose **All Terms** in the **Term** drop-down box.
- Place a checkmark next to **YTD Attendance (includes withdrawn students)**.
- Check the **Absent Codes** and make sure all codes that you use are listed.
    a. Make sure if you use "Homebound" as an absence code, that it is available in the right-hand side.
- Change the **Sort** option to **Student**.
- Press **Preview**.

- Click on the image of a closing door and you will be asked if you want to print.

- Press **Yes**.
- For your printer choose "pdf".

- Then save the file to your computer.
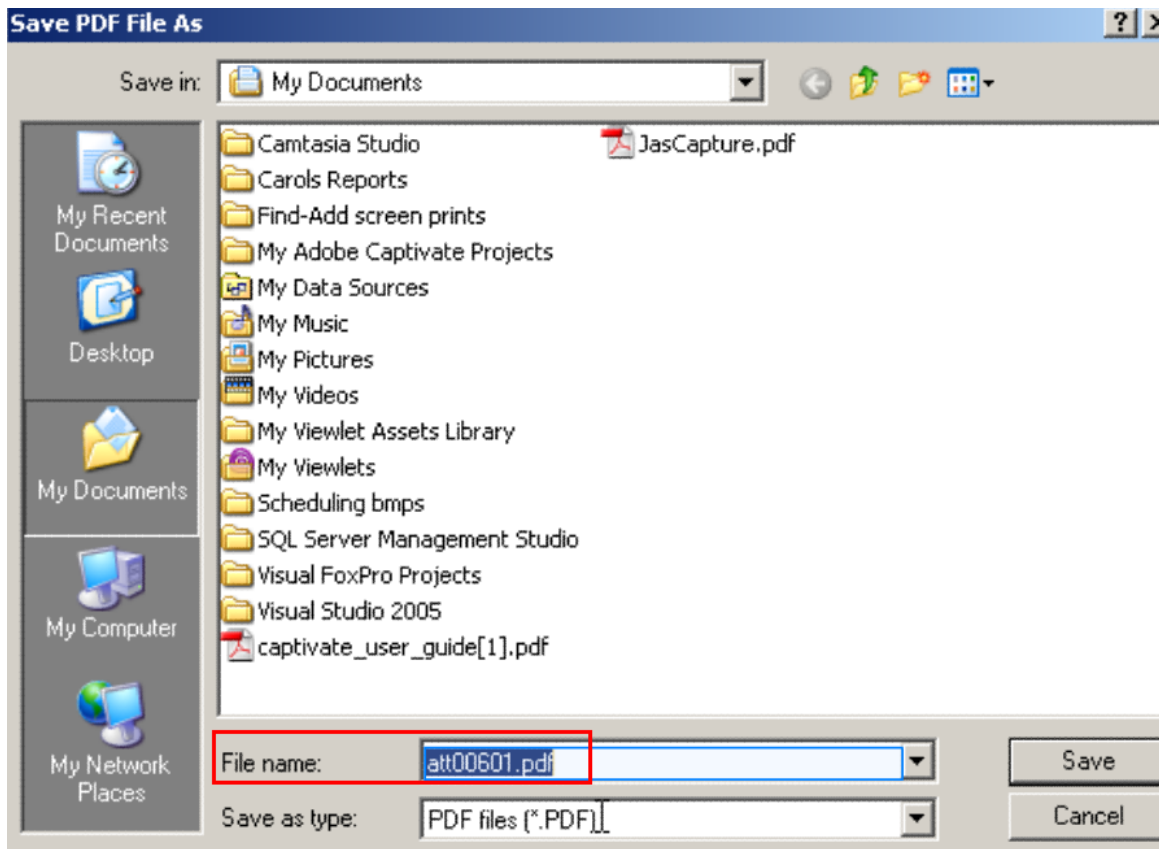
- Give the file a name. You should include the year as part of your filename.
- If USOE hosts your data, you'll need to save the file to your C drive. The name will be something like "C on computername" where computername is the name of your computer.
- Press **Save**.

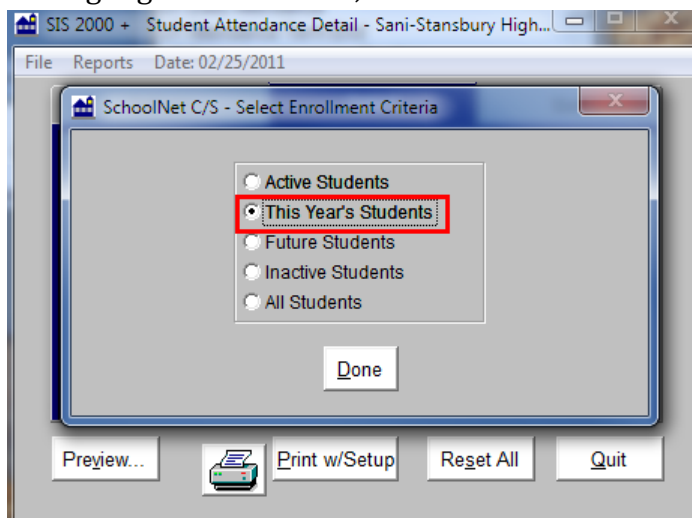## Student Attendance Detail Report

To run the "**Student Attendance Detail Report**", highlight the report and press **Select**.
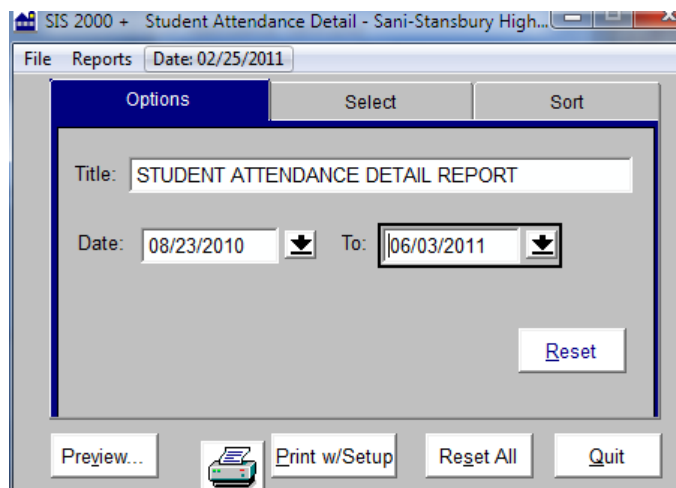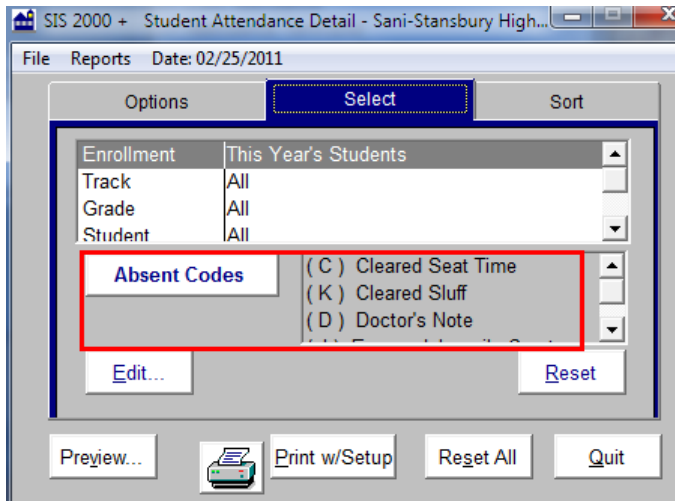
- Make sure the date range covers the entire school year.
- Click on the "Select" tab.
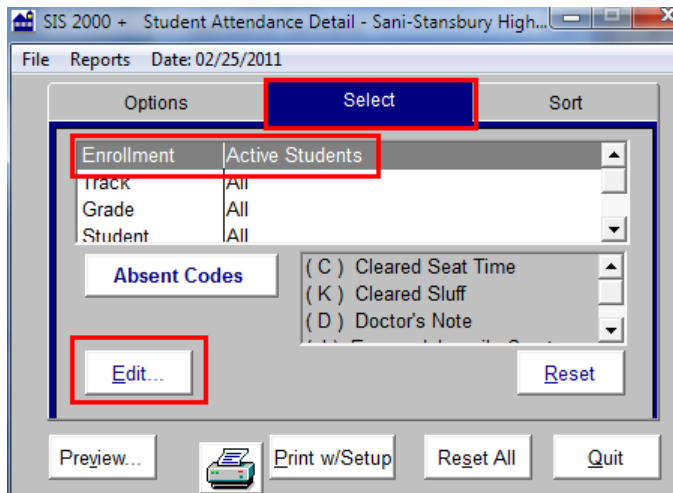
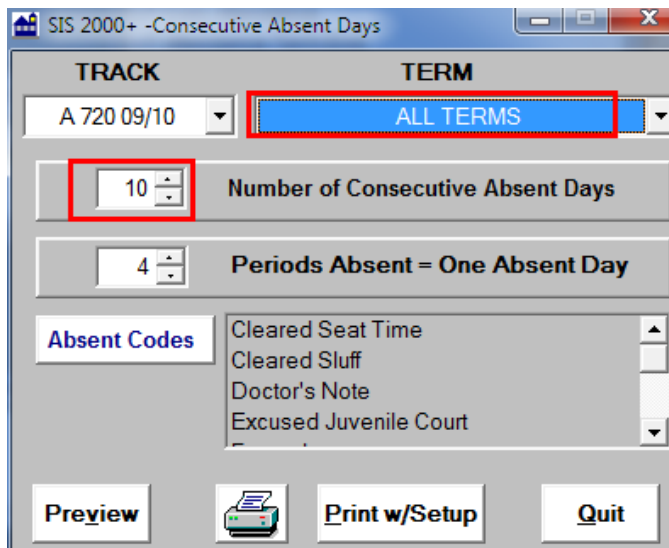- Highlight **Enrollment**, then click **Edit**.

- Choose "This Year's Students" on the screen that displays.
- Press **Done**.
- Verify the Absence codes.

- Press **Preview**.
- Print to pdf as described in the section for the report "Ut Attendance Term End".

10 Day Audit Report

To run the "**10 Day Audit Report**", highlight the report and press Select.

- Choose "All Terms". Leave "10" in the **Number of Consecutive Absent Days**.
- Preview and print to pdf as described in the section for the report "Ut Attendance Term End".

Run Clearinghouse Reports as Archive Reports

Even though you submitted your Clearinghouse upload, you need to run Clearinghouse reports to archive. On the main menu choose UT Audit/Uploads > Clearinghouse Upload.

- Make sure the **Ending** date is the last day of the school year.
- Highlight the school
- Checkmark "Year Round Membership" so that all three reports under that category will be checked. Also checkmark the "CTE Membership Report". These reports are the ones auditors usually review.
- Press **Preview**.
- Save all as pdfs.

Grades Not Finalized Report

Another report you'll want to run to make sure your grades will all appear on the transcript is the "**Grades Not Finalized**" report. This report will alert you to grades that have not yet been finalized. However, if all of your classes are at the elementary level and if you don't care if the grades are finalized, you can skip this report.

- To run this report, go to SIS on the Web.

- Go to Reports > Academic Progress > Grades Not Finalized.

- Make sure the correct track is showing. You will need to run this report for each term separately.

- If you have been running this report each term throughout the school year, the results should come back as zero.
- There is no need to save this report. Just print it out and use it to finalize all grades.

NOTE: Once the year-end rollover is complete, USOE CANNOT recreate the Gradebook and finalize the grades, so it is important to finalize your grades BEFORE rolling over the year.

Running the Grades Not Finalized report is so crucial, you'll get a reminder message about running it when you attempt to run the year-end process in FoxPro. If you've already verified that all grades have been finalized, just click OK when the warning comes up.

If not, click Cancel and go back to that step.

Run Transcript Report
The final report to run is the Student Transcript

This report is found on the web under Reports > Academic Progress > Student Transcript.

- Run this report twice. Once without "Year End Archival" checked and once with it checked. Run it WITHOUT being checked first.
- Choose the correct **track**.
  - If you're a district, you'll have to run this report for each school.
- Select **All Students.**
- Press **Continue** to see the following.

- Run the report WITHOUT "Year End Archival" being checked.
- Under "Report Format" make sure "Acrobat (.pdf)" is selected.
- Press **Generate Report**.
- Save the pdf report that is generated.
- Next, run the same report, but this time place a checkmark next to "Year End Archival". You'll need to run the report both ways for ALL tracks.

> o When you run this report with "Year End Archival" checked this will give you students who left one year ago and who will be removed from the database after the year-end process is run.

- Press **Generate.**
- Save to pdf.

Retaining Students

Once all reports have been run, for any student who will be retained in the current grade – including 12th grade "super seniors" – mark **Retain Student** on the Student Editor > Miscellaneous tab.

Retaining Lockers

Next, if the school wants students to keep the same locker or the same advisor for the upcoming track, go to System > School Editor.

- Press **List** or **Find** to find the right track.
- Press **Edit**.

- Place a checkmark next to "Retain Advisors" and/or "Retain Lockers".
- Press **Save**.

When you press Save, "New Year Init Process" will automatically be checked. After the process is run, all the students enrolled from that point on are automatically given a future status record in addition to their Active record for this track.

Database Processes

All schools whose data are hosted by USOE will need to contact USOE to run the database processes for them (once they've completed all the steps outlined above).

If a school is **self-hosting** they will need to do the following:

1. Run the stored procedure sp_setgradyear
2. Create the End-of-year database
3. Backup and restore the current database into the new End-of-year database.

The Final Step

1. Go to the Main Menu > System > New Year Menu > Year End.
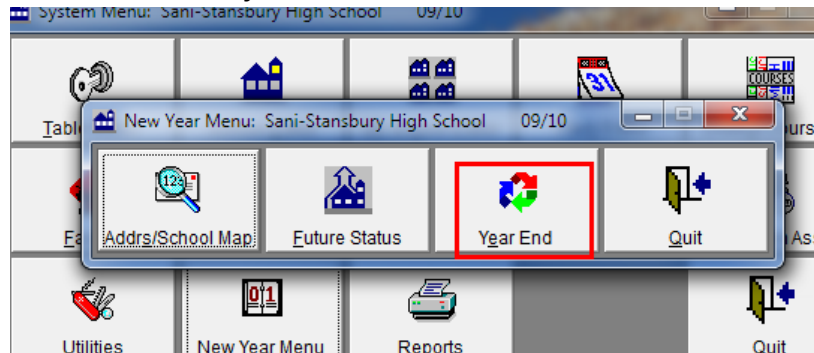
a. You'll get a warning to make sure the Grades Not Finalized report was run. If you have taken care of this, press **OK**.
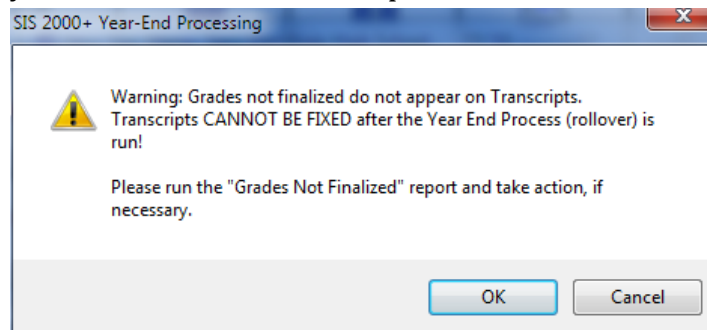
b. When you click OK, you may get a message that your Year End database backup has not yet been created.
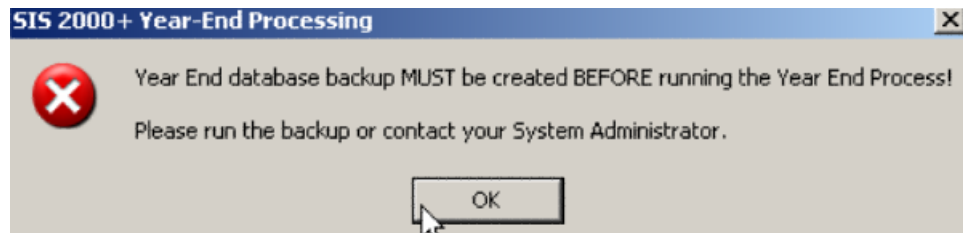
If this message appears, the process cannot continue until the backup is complete.

2. Assuming that your database backup has been created, you will click OK and you will see the following screen.

School	School Name	Year	Student Future Status Processed
801	Sani-C.R.Sundwall	2008	No
108	Sani-Red Rock Elementary	2008	No
104	Sani-H M Knight Intermediate	2008	No
404	Sani-Grand Co Middle School	2008	No
000	Sani-Grand District Office	2008	No
704	Sani-Grand High	2008	Yes

A list of one or more schools, plus the District Office, appears

Process   Quit

    a. Only schools that have NOT been rolled over to the New Year are listed.
    b. All schools, including the District Office, should be processed.
    c. One or more schools can be processed at once, not necessarily in order.

3. On the right side of the screen, where it says "Student Future Status Processed", it will say either Yes or No. This is to remind you whether or not you've completed the "Student Future Status Process" for that school. This process creates student records for the new track.
    a. If you have not completed the Student Future Status Process and you press **Process** anyway, you will receive a warning that there will be no faculty/student records in the new track and they will have to be manually entered. You will then be able to choose whether or not to continue.

4. To complete year-end processing, you'll have to roll over all schools, including the district office. Of course, since the district office has no students directly attached to it, it will say "No", which is okay.

5. Highlight one or more schools and press **Process**.

6. This will DELETE ALL Gradebook, Attendance, and Schedule Records for the current track.

7. If you did not retain lockers, locker assignments will be deleted.

8. Students/Faculty with future status will become Active in the new track.

9. If you don't use the Food Service module, you're done.